CITY OF REGINA

RETAIL MARKET STUDY
1986 UPDATE

PLANNING DEPARTMENT

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RETAIL MARKET STUDY - 1986 REPORT

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RETAIL MARKET STUDY - 1986 REPORT

1.1 Summary and Background

1.1.1 Summary

This supply and demand analysis is given to assist City council in its decision of whether to continue the moratorium on major retail development in the City.

The Study model incorporates the latest information regarding the supply of and the demand for retail space in the City of Regina, as well as the balance between supply and demand.

The major finding is the continuing oversupply of Gross Leasable Area (G.L.A.) of Department Store Type Merchandise (D.S.T.M.), given a modest equilibrium level of $156 per sq.ft. Note that this level is based on the national average in the recession year 1982. The actual sale per sq.ft. G.L.A. in October 1986 in Regina was only $151.

1.1.2 Background

At its meeting of December 2, 1985, City Council extended the hold it had imposed one year earlier on any development of department store type merchandise (DSTM) in the city of Regina exceeding 50,000 square feet. This decision followed the recommendation of the Retail Market Study[1]. A "hold" on such development has the following implications: that Council would not permit new DSC-Designed Shopping Centre Zones or expansion of existing ones. Existing DSC zones are developed to their maximum permitted density.

At the time of the original Retail Market Study (1982) it was also decided that the development of DSTM would be monitored on a routine basis and reported once a year.

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[1] Woods Gordon: Retail Market Study, September 1981.

1.2 Methodology

1.2.1 Purpose

The annual monitoring process follows the model of supply and demand for retail floor space used by Woods Gordon. In essence, the model compares the actual retail floor space in the City (supply) with the amount that is needed, given the population and income of the Regina Trade Area (demand). An average sales per square foot (Equilibrium Level) is used to assess the level of adequacy of retail floor space.

1.2.2 Model Upgrade and Update

The following updating and upgrading steps were implemented since the original study of 1982:

1. the establishment of a complete listing of Regina businesses and their floor space (Appendix D). The computerized listing was initially formulated in September 1983, with specific total floor space by type of activity and location. Since the Assessment Department has recently computerized its business tax role, The Planning Department has decided to avoid duplication. A specific software program has been designed to transform the Assessors' business tax role into the Planning Department's required format.

2. the establishment of a computerized model of supply and demand which permits easy updating, including the entry of the current economic and demographic data and the adjustment for inflation.

3. the adjustment of the model to the differences which exist between DSTM as type of stores, and DSTM as type of commodities (Appendix A).

4. the replacement of the generic "industry average sales per sq.ft." of Woods Gordon's original study with the "Regina Weighted Equilibrium Level". This level is the weighted average of each DSTM type of activity and its locality - Regional, Community or Neighborhood Centres. The various Canadian sale levels of each type of DSTM store, within the context of its location, are weighted against the related total floor space and the locality in Regina.

5. the update of the Trade Area Weighted Income Index (Appendix B).

1.2.3 Model Process

The following steps are used in the comparison between supply and demand for DSTM and Food floor space (Appendix E):

1. Summary of the Regina DSTM and Food floor space by Standard Industrial Classification (SIC) code (Table 1-2, Fig. 2). The summary is given by 3 categories (Tables 1-2):

a) Downtown,
b) Major Shopping Centres,
c) Retail Strips & Small Shopping Centres.

2. Estimate of the current Regina Trade Area population by zone (Table 3, Fig. 1):

a) Prime Trade Area, Sectors 1 and 2,
b) Secondary Trade Area, Sectors 1 and 2 .

3. Regina Consumer Price Index for each of DSTM and Food commodities (Table 4) adjusts the current dollar value of any currency statistics (steps 4, 5, and 10).

4. The share of DSTM and Food expenditures in DSTM, Food and Other stores (Tables 6A, 6B) is based on:

a) the retail sales ratio by type of store and type of commodity (Appendix A),
b) the Saskatchewan Personal Expenditure (Table 5).

5. The Regina Trade Area per capita expenditure on DSTM and Food commodities in retail stores (Tables 7-8) is estimated based on:

a) the Saskatchewan Personal Expenditure (Step 4),
b) the current Saskatchewan population,
c) the Trade Area Weighted Income Index (App. B).

For the period between December 1985 and October 1986, the model assumes 4% real growth in the demand for DSTM commodities, and the return to the 1981 per capita of Food expenditures.

6. The potential, or the total expenditures of the Regina Trade Area for DSTM floor space (Table 9), is assessed by using:

a) the above (Step 5) Trade Area Expenditure on DSTM
b) the Trade Area current populations.

7. The total demand for DSTM floor space in Regina Table 10) is based on:

a) the total Trade Area expenditure on DSTM (Step 6)
b) the Regina DSTM demand ratio from the following geographic divisions (see the original study):

* Primary Trade Area (the population of this area spends 85% of their DSTM expenditures in Regina),
* Secondary Trade Area (the population of this area spends 40% of their DSTM expenditures in Regina),
* Overall, The Regina Trade area population generates 85% of the DSTM activity in Regina. An additional 15% originates outside the Trade Area.

8. The total expenditures (potential) and the total demand for Food floor space in Regina (Table 11) are calculated based on personal expenditures on Food (Step 5) and the Prime Trade Area population (Step 4).

9. The 1984 Dollars & Cents Shopping Survey (1982 data) is used to define (Appendix C):

a) the (1982) Canadian sales per square foot for each retail store type and its locality level (Regional, Community or Neighborhood).

b) the Regina Weighted Equilibrium Levels for DSTM and for Food stores, based on the above and on the total floor space for each retail store type and its locality as following (Fig. 3):
* Regional Centre - downtown core,
* Community Centres - all retail stores located in the major malls, on Albert St and Victoria Avenue, and in the warehouse area north of the downtown.
* Neighborhood Centres - the remaining stores.

10. The 1986 Regina Weighted Equilibrium Levels for DSTM (Table 12) updates the above 1982 currency data (Step 9). The Equilibrium Level for food stores is based on a recent (1985) survey[1]. The method involves the implementation of the Consumer Price Index (Step 3) on the share of DSTM and Food expenditures in DSTM, Food and Other stores (Step 4).

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[1] Canadian Grocer: Food Distribution Industry Overview, 1985. Note that the level of $518/sq.ft, which reflects the floor area accessible to the public, is adjusted here to $358.5/sq.ft to reflect the G.L.A. definition (for 1986).

11. The Comparison between supply (Step 1) and demand (Step 7-8) of DSTM and Food through the use of the updated Equilibrium Levels (Step 10) as displayed in Table 12 and 13.

12. The estimated actual sales per sq.ft. versus the Equilibrium Levels in Regina (Table 14) which reflects the above factors (Step 11) in a different mathematical relationship.

1.3 Findings

1.3.1 Department Store Type Merchandize (DSTM)

In October 1986, the total supply of Gross Leasable Area (G.L.A.) of DSTM in Regina was 3,915,111[1]. sq.ft. which was distributed as following:

a) Downtown - 27.3%
b) Major shopping malls - 26.8%
c) Retail strips & small shopping centres - 46.7%

In October 1986, the total demand for DSTM G.L.A. by Regina Trade Area and outsiders was 3,792,966 sq.ft. which originated from:

a) Primary Trade Area - 67%
b) Secondary Trade Area - 18%
c) Inflow - 15%

The overall DSTM Regina Weighted Equilibrium Level, in October 1986 was $156.4 sale per sq.ft.[2] This varied between the following localities:

a) Regional centre - $223.5/sq.ft.
b) Community Centres - $138.2/sq.ft.
c) Neighborhood centres - $130.9/sq.ft.

The comparison between supply and demand for DSTM establishes an oversupply of 122,145 sq.ft. G.L.A., or an overall actual sales of $151.5/sq.ft compared to the equilibrium level of $ 156.4/sq.ft.

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[1] When comparing with last year's statistics (Retail Market Study, 1985 Revision), note differences in the classification methods between the Planning Department and the Assessors Department.

[2] This is based on 1982, a recession year sales level. Although it is inflation adjusted, it may still reflect a low value compare to the present. In other words, the oversupply of floor space may be higher.

1.3.2 Food

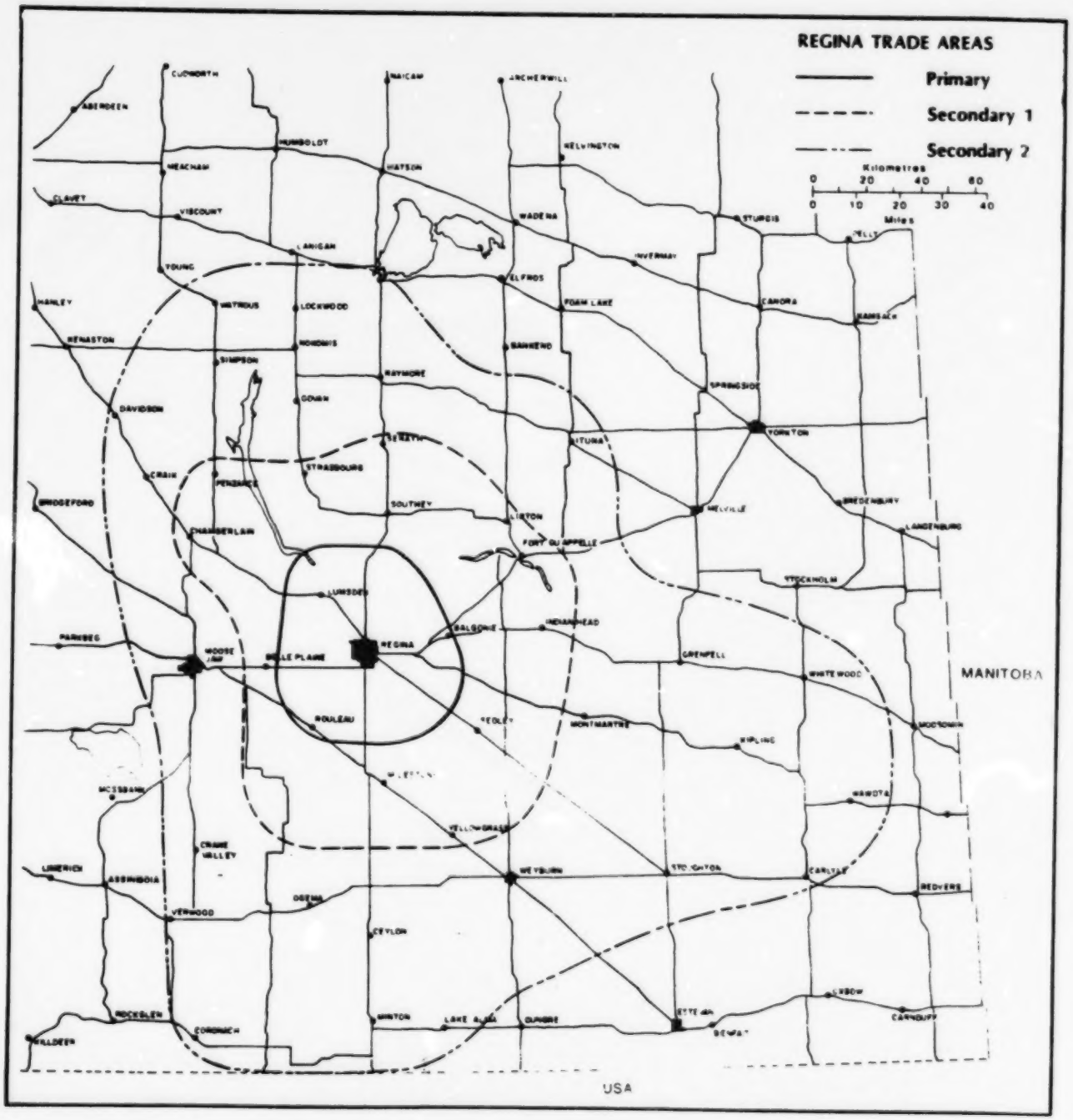
In October 1986, the total supply of G.L.A. of Food in Regina was 768,296 sq.ft which was distributed as following:

a) Downtown - 12.6%
b) Major shopping malls - 28.7%
c) Retail strips & small shopping centres - 58.7%

In October 1986, the total demand for Food G.L.A. by the Regina Primary Trade Area was 793,017 sq.ft.

The overall Food Equilibrium Level, as for October 1986, was $358.5 sale per sq.ft. The comparison between supply and demand for Food establishes an insignificant undersupply of 24,721 sq.ft. G.L.A., or an overall actual sales of $370.1/sq.ft compared to the equilibrium level of $ 358.5/sq.ft.

Figure 1



SOURCE: Woods Gordon: Regina Retail Market Study (Appendix E) ,September 1981

Figure 2

LOCATION OF SHOPPING AREAS IN REGINA

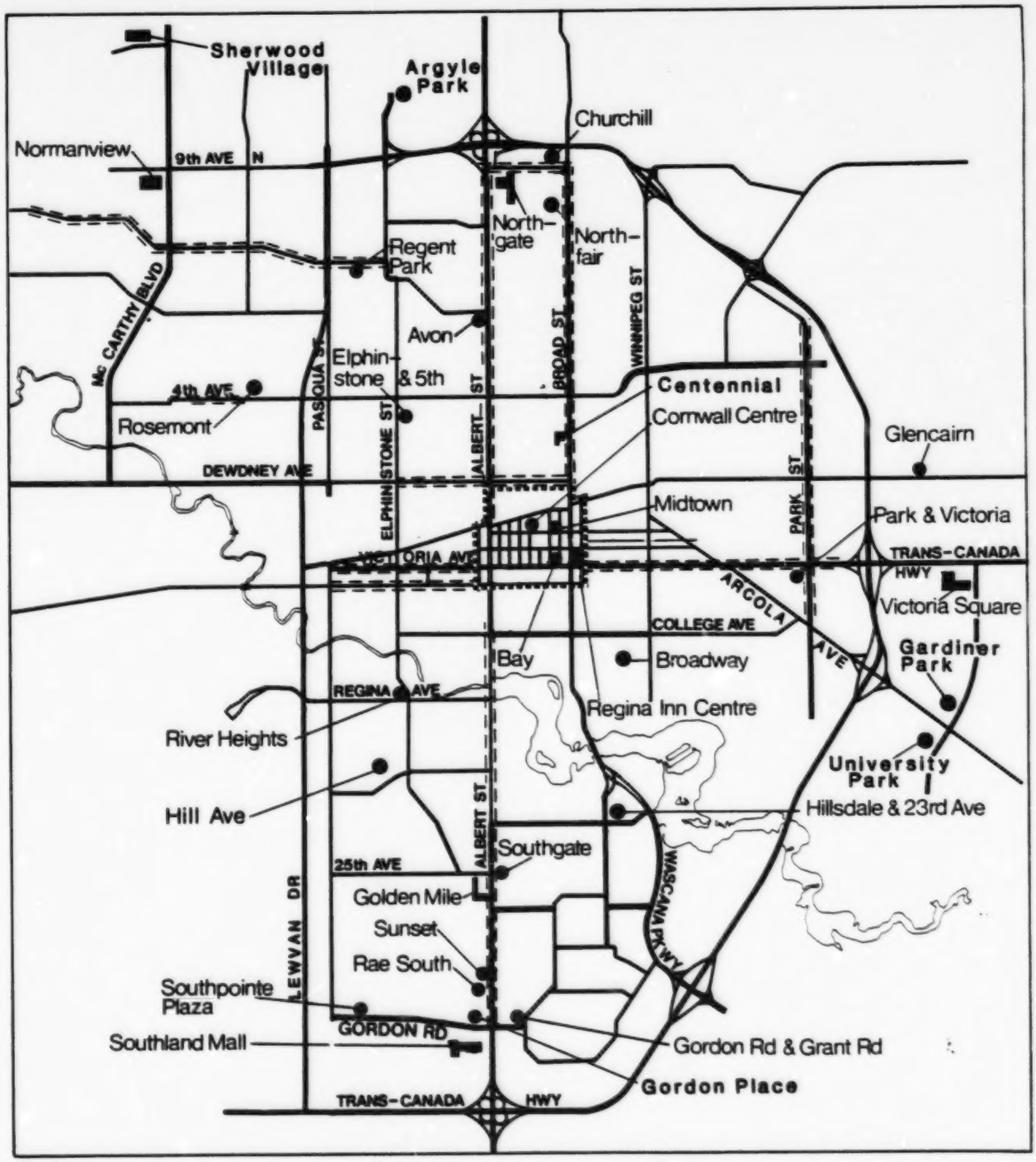
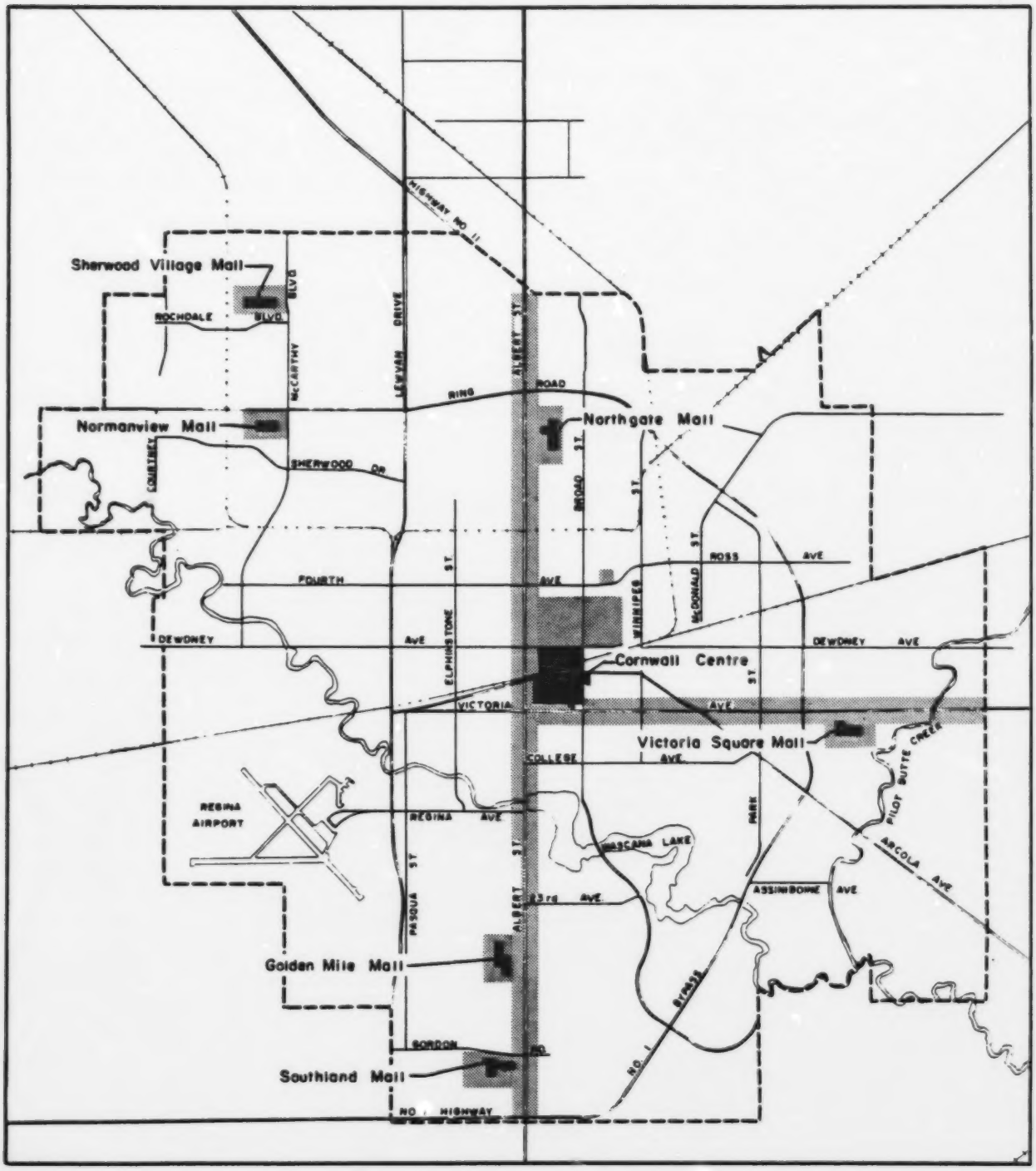


Figure 3

REGIONAL AND COMMUNITY SHOPPING CENTRES

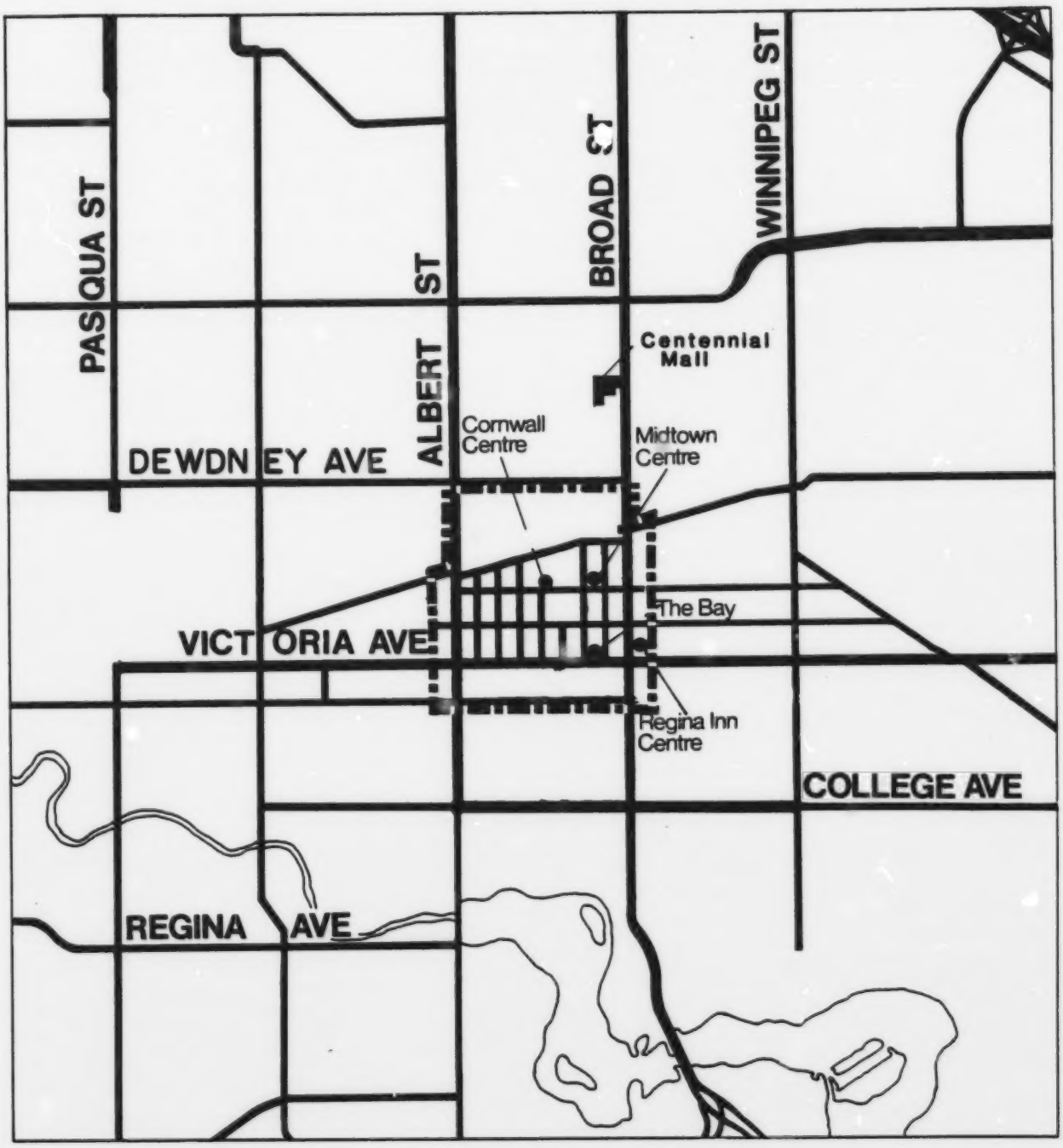


Regional Shopping Centre

Community Shopping Centre

Figure 4

THE REGINA DOWNTOWN



Boundary of Downtown used for Study

SCALE: 3.9 cm = 1 Km

TABLE 1: Occupied Retail DSTM and Food, October 1986: Overall Market

SIC Code	Description	Overall Major Malls		Downtown ***		Retail Strips & Small Shopping Centres		OVERALL MARKET	
		No.	AREA*	No.	AREA*	No.	AREA*	No.	AREA*
J603	Prescription Drugs	6	50,237	9	22,987	26	90,250	41	163,473
J611	Shoe Store	15	23,387	13	22,371	4	5,112	32	50,870
J614	Other Clothing	58	149,918	74	183,503	24	52,291	156	385,712
J615	Fabric & Yarn	1	2,257	2	2,943	6	47,213	9	52,413
J621	Household Furniture	0	0	2	9,508	26	446,582	28	456,090
J622	Appliance T.V Radio Stereo	3	3,363	4	6,136	91	177,120	98	186,619
J623	Household Furnishings	0	0	2	1,737	25	89,384	27	91,121
J641	General Merchandising	9	721,848	4	350,484	7	315,890	20	1,388,222
J651	Book & Stationery	6	13,254	9	19,250	29	95,447	44	127,951
J652	Florist Lawn & Garden Centres	6	6,718	5	7,809	20	116,974	31	131,501
J653	Hardware Paint Glass & Wallpaper	4	12,337	3	10,813	27	119,943	34	143,093
J654	Sporting Goods & Bicycle	5	12,636	7	38,163	15	37,192	27	87,991
J655	Musical Instruments & Records	7	7,469	8	16,040	21	47,854	36	71,363
J656	Jewellery Watches & Repair	12	17,167	16	20,832	8	8,113	36	46,112
J657	Camera & Photographic	4	2,804	6	7,297	10	21,143	20	31,244
J658	Toy Hobby Novelty Souvenir	10	10,630	10	11,089	28	50,406	48	72,124
J659	Other Special (no second hand)	37	34,018	39	317,877	58	107,406	134	459,300
Subtotal DSTM		183	1,068,041	213	1,048,838	425	1,828,321	821	3,915,111
E101 **	Manufacturing Meat & Poultry Products					8	3,040	8	3,040
E107 **	Manufacturing Bakery Products	3	1,107	2	511	15	18,228	20	19,846
J601	Food Store	17	219,436	9	96,537	125	429,438	151	745,411
Subtotal Food		20	220,543	11	97,048	148	450,706	179	768,296
TOTAL RETAIL		204	1,289,565	224	1,145,886	573	2,279,027	1,000	4,683,407

* Supply totals were converted to Gross Leasable Area from the Taxed Area (90% of the G.L.A). DSTM total excluded 27,139 sq.ft. of the estimated floor space for sales of auto parts.

** Numbers represent 20% of total floor space for retail portion.

*** The downtown boundaries have been redefine to include the area north of the railway up to Dewdney Ave. The new Superstore, which is included in the extanded area, is classified as DSTM and Food in equal share of the floor space.

**** When comparing with last year's statistics (Retail Market Study, 1985 Revision), note the differences in the classification methods between the Planning Dep't and the Assessors Dep't. This new data base eliminates further duplications.

Source: Regina Business File, Assessment Department and Planning Department

TABLE 2: Occupied Retail DSTM and Food, October 1986: Major Malls

SIC ***	Centennial		Golden Mile		North Gate		Norman View		South Land		Sherwood Village		Victoria Square		OVERALL MALLS	
Code	No.	AREA*	No.	AREA*	No.	AREA*	No.	AREA*	No.	AREA*	No.	AREA*	No.	AREA*	No.	AREA*
J603			1	4,933	1	9,719	1	6,350	1	7,744	1	8,801	1	12,689	6	50,237
J611					6	10,200	1	917	5	8,114	1	1,302	2	2,853	15	23,387
J614	2	6,864	6	20,699	19	46,939	1	6,272	15	39,859	3	10,369	12	18,916	58	149,918
J615	1	2,257													1	2,257
J621									1	981						
J622					1	662	1	1,139	1	1,562					3	3,363
J623															0	0
J641	1	177,189	1	64,918	2	143,098	1	66,308	1	156,730	2	47,702	1	65,903	9	721,848
J651			1	2,582	2	3,789			1	2,372	1	1,941	1	2,570	6	13,254
J652	1	1,376	1	1,578	1	1,026			1	900	1	803	1	1,036	6	6,718
J653			1	2,121			2	7,550					1	2,636	4	12,337
J654			1	3,182	2	4,034	1	3,797	1	1,622					5	12,636
J655	1	596			2	3,374	1	458	1	1,497			2	1,544	7	7,469
J656			2	2,176	4	6,157	1	602	3	5,663	1	369	1	2,200	12	17,167
J657			2	1,538					2	1,267					4	2,804
J658	1		1	1,406	1	1,183	4	3,432	2	3,244	1	1,364			10	10,630
J659	3	2,277	4	4,134	10	8,077	6	5,153	6	4,993	4	4,907	4	4,477	37	34,018
Subtl DSTM	10	190,558	21	109,267	51	238,258	20	101,978	41	236,550	15	77,559	26	114,853	183	1,068,041
E101 **																
E107 **			1	464	1	472					1	172			3	221
J601	2	2,856	2	23,391	2	37,931	2	30,123	2	38,100	5	38,558	2	48,477	17	219,436
Subtl Food	2	2,856	3	23,855	3	38,403	2	30,123	2	38,100	6	38,730	2	48,477	20	220,543
TOT RETAIL	12	193,413	24	133,121	54	276,660	22	132,101	43	274,650	21	116,289	28	163,330	204	1,289,565

* Supply totals were converted to Gross Leasable Area from the Taxed Area (90% of GLA). DSTM total excluded 27,139 sq.ft. of the estimated floor space for sales of auto parts in stores classified as J641 and J653.

** Numbers represent 20% of total floor space for retail portion.

*** See Table 1 for description of the related SIC (Standard Industrial Classification) list.

Source: Regina Business File, Assessment Department and Planning Department

TABLE 3: Regina Trade Area Population 1981, 1985 and 1986

	1981	1985	Oct. 1986 *
Primary Trade Area			
1. City of Regina	162,984	173,700	177,681
2. Division 6 (less Regina)	10,413	11,805	11,916
Primary Sub-Total	173,397	185,505	189,597
Secondary Trade Area			
1. Sector 1	24,318	25,292	25,203
2. Sector 2	112,195	113,384	106,399
Secondary Sub-Total	136,513	138,676	131,602
Total Trade Area	309,910	324,181	321,199

* Regina estimate based on linear growth bewtween 1981 and June 1986, and constant poulation for the area outside Regina as in June 1986.

Source : Statistics Canada: 1981 Census and 1985 estimates (Regina)
Sask. Hospital Services Plan 1981, 1985, 1986 Covered Population (outside Regina)

TABLE 4: Consumer Price Index for Selected Merchandise 1980 - 1986*

	1981	1982	1985	1986(Jan-Oct.)
Tobacco	100.0	112.2	174.7	208.6
Clothing & Footwear	100.0	105.8	116.2	115.5
Furniture & Furnishings	100.0	110.3	124.4	124.7
Health & Personal Care	100.0	110.6	131.1	134.9
Recreation & Reading	100.0	108.4	123.9	128.7
Transportation	100.0	105.5	122.2	121.5
Food & Beverages	100.0	107.1	117.0	112.5

* Annual averages for 1980-1985, Jan-Oct. average for 1986

TABLE 5: Saskatchewan DSTM & Food Expenditures 1981 - 1985

($ Million)

Commodity	1981	1985
Food & Beverages	970	1,291
Tobacco	159	231
Clothing	374	470
Footwear & Repair	76	96
Furniture Floor coverings	179	169
Appliances	162	171
Furnishings	269	310
Household non-durable supplies	109	146
Drugs & Sundries	88	134
Recreation Sportng Equipment	341	431
Books Newspapers	85	105
Jewellry Watches	65	61
Toilet & Cosmetics	46	67
Total Sales	2,923	3,682

Source: Sask. Personal Expenditure on Goods and Services by Detailed Classification, 1981 1985, Sask. Bureau of Statistics.

TABLE 6A: Share of DSTM & Food Expenditures in DSTM, Food & OTHER Stores - 1981 SASKATCHEWAN

($ millions)

Commodity	ACTUAL				ADJUSTED (Oct. 1986 $)			
	FOOD Stores	DSTM Stores	OTHER Stores	TOTAL Stores	FOOD Stores	DSTM Stores	OTHER Stores	TOTAL Stores
Food and Beverages	875	48	46	970	984	54	52	1,091
Tobacco	91	59	9	159	190	124	19	332
Clothing	0	374	0	374	0	432	0	432
Footwear & Repair	0	75	1	76	0	87	1	88
Furniture, Floor Cover	16	162	1	179	20	202	1	223
Appliances	15	146	1	162	18	183	1	202
Furnishings	24	243	1	269	31	303	2	335
Household non-dura suppl	10	99	1	109	12	123	1	136
Drugs & Sundries	10	76	1	88	14	103	1	118
Recreation, Sporting	0	249	91	341	0	321	118	439
Books Newspapers	30	53	2	85	39	68	3	109
Jewellry Watches	0	65	0	65	0	75	0	75
Toilet & Cosmetics	12	33	0	46	17	45	0	62
Total Sales	1,085	1,684	154	2,923	1,325	2,119	198	3,642

Source: Table 5 and Appendix A

TABLE 6B: Share of DSTM & Food Expenditures in DSTM, Food & OTHER Stores - 1985 SASKATCHEWAN

($ millions)

Commodity	ACTUAL				ADJUSTED (Oct. 1986 $)			
	FOOD Stores	DSTM Stores	OTHER Stores	TOTAL Stores	FOOD Stores	DSTM Stores	OTHER Stores	TOTAL Stores
Food & Beverages	1,165	64	62	1,291	1,120	62	59	1,241
Tobacco	132	86	13	231	158	103	15	276
Clothing	0	470	0	470	0	467	0	467
Footwear & Repair	0	95	1	96	0	94	1	95
Furniture Floor Cover	0	169	0	169	0	169	0	169
Appliances	16	155	1	171	16	155	1	171
Furnishings	28	280	2	310	28	281	2	311
Household non-dura suppl	13	132	1	146	13	132	1	146
Drugs & Sundries	16	116	1	134	16	120	1	137
Recreation Sporting	0	315	116	431	0	327	120	448
Books Newspapers	37	65	3	105	39	68	3	109
Jewellry Watches	0	61	0	61	0	61	0	61
Toilet & Cosmetics	18	49	0	67	18	50	0	69
Total Sales	1,425	2,057	199	3,682	1,409	2,089	204	3,701

Source: Table 5 and Appendix B

TABLE 7: Regina Trade Area Per Capita Expenditures: DSTM*

	DSTM ** INDEX	1981	1985	1986***
Saskatchewan ****	100	$2,188	$2,052	$2,114
Primary Trade Area				
Sector One - Regina	119	$2,594	$2,432	$2,506
Sector Two	92	$2,016	$1,891	$1,948
Secondary Trade Area				
Sector One	93	$2,042	$1,915	$1,973
Sector Two	96	$2,093	$1,963	$2,023

* Adjusted Dollar to 1986 Values
** Source: Appendix B
*** Based on real growth of 4% per annum for 1986.
**** Based on Statistics Canada estimates of total population of Saskatchewan:
June 1981: 968,313 June 1986: 1,017,800

Source: Sask. Adjusted Expenditures (Table 6)/Sask. Population

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TABLE 8: Regina Trade Area Expenditures and Potential: Food*

	DSTM INDEX	1981**	1985	1986 (Oct)
Saskatchewan	100	$1,369	$1,384	$1,335
Primary Trade Area* **				
Sector One				
Population		162,984	173,700	177,681
Per Capita Expenditure	119	$1,369	$1,640	$1,582
Potential**** (millions)		$223.1	$284.9	$281.1
Sector Two				
Population		10,413	11,805	11,916
Per Capita Expenditure	92	$1,369	$1,275	$1,230
Potential**** (millions)		$14.3	$15.1	$14.7
Total Trade Area Potential (millns)		$237.3	$300.0	$295.8

* Adjusted Dollar to 1986 Values

** Actual expenditures per capita for 1981 and 1985, and projected expenditure for October 1986 are based on Statistics Canada estimates of the total population of Saskatchewan for the periods: a) June 1981: 968,313 b) June 1985: 1,017,800 and on the assumption of a constant food consumption since 1985.

*** Assumes that residents of the secondary trade area do not regulary make grocery purchases in Regina.

****Potential is derived by multiplying the trade area population with the per capita expenditure.

Source: Sask. Adjusted Expenditures (Table 6)/Sask. Population

TABLE 9: Regina Trade Area Potential: DSTM*

	1981	1985	1986 (Oct.)
PRIMARY TRADE AREA			
Sector One			
Population	162,984	173,700	177,681
Per Capita Expenditure	$2,594	$2,432	$2,506
Potential (millions)	$422.7	$422.5	$445.3
Sector Two			
Population	10,413	11,805	11,916
Per Capita Expenditure	$2,016	$1,891	$1,948
Potential (millions)	$21.0	$22.3	$23.2
Total Primary Trade Area DSTM potential (millions)	$443.7	$444.8	$468.5
SECONDARY TRADE AREA			
Sector One			
Population	24,318	25,292	25,203
Per Capita Expenditure	$2,042	$1,915	$1,973
Potential (millions)	$49.7	$48.4	$49.7
Sector Two			
Population	112,195	113,384	106,399
Per Capita Expenditure	$2,093	$1,963	$2,023
Potential (millions)	$234.9	$222.6	$215.2
Total Secondary Trade Area DSTM potential (millions)	$284.5	$271.1	$264.9
TOTAL TRADE AREA DSTM POTENTIAL (millions)	$728.2	$715.9	$733.4

* Adjusted Dollar to 1986 Values

Source: Potential is derived by multiplying the trade area population (Table 3) by the per capita expenditure (Table 7).

TABLE 10: Demand for DSTM Floor Space

	1981	1985	1986(Aug.)
		(millions of $)	
Primary Trade Area			
Potential	443.7	444.8	468.5
(85% to Regina)	377.2	378.1	398.2
Secondary Trade Area			
Potential	284.5	271.1	264.9
(40% to Regina)	113.8	108.4	106.0
Inflow (15%)	86.6	85.9	89.0
Total Allocated to Regina	577.6	572.4	593.2
		(millions of sq.ft.)	
Adjusted Level: $156.4 / sq.ft*	3.7	3.7	3.8

* adjusted level for 1986 (from $135.08 / sq.ft in 1982)

Source: Table 9

TABLE 11: Demand for Food Floor Space

	1981	1985	1986
		(millions of $)	
Primary Trade Area Food Potential	237.3	300.0	295.8
Total allocated to Regina	237.3	300.0	295.8
		(millions of sq.ft.)	
Adjusted Level: $373.0 / sq.ft*	0.636	0.804	0.793

* adjusted level for 1986 (from $372.96 / sq.ft in 1985)

Source: Table 8

TABLE 12: DSTM & Food Growth in sales($)/sq.ft. - 1986 Update

Commodity	1982-86 Inflation	Food Store Share	DSTM Store Share	Food Adjust Increa	DSTM Adjusted Increase
Food & Beverages (Food & Bevrgs)	5.02%	80.68%	2.88%	4.05%	0.14%
Tobacco (Tobacco)	85.94%	8.38%	3.52%	7.20%	3.02%
Clothing (Clothing & Footwear)	9.13%	0.00%	22.21%	0.00%	2.03%
Footwear & Repair (Clthng & Footwr)	9.13%	0.00%	4.47%	0.00%	0.41%
Furniture Floor Cover (Fur Furnshg)	13.04%	1.50%	9.61%	0.20%	1.25%
Appliances (Furniture Furnishing)	13.04%	1.36%	8.70%	0.18%	1.13%
Furnishings (Furniture Furnishing)	13.04%	2.26%	14.44%	0.29%	1.88%
Hshld non-dur supp (Furn Furnshng)	13.04%	0.91%	5.85%	0.12%	0.76%
Drugs & Sundries (Health Personal)	21.94%	0.97%	4.54%	0.21%	1.00%
Recreation Sporting (Recrt Readng)	18.71%	0.03%	14.80%	0.01%	2.77%
Books Newspapers (Recrtn Reading)	18.71%	2.78%	3.13%	0.52%	0.59%
Jewellry Watches (Clthng & Footwr)	9.13%	0.00%	3.86%	0.00%	0.35%
Toilet & Cosmetics (Health Personl)	21.94%	1.14%	1.99%	0.25%	0.44%
TOTAL		100.00%	100.00%	13.02%	15.78%

1982 DSTM, 1985 Food ($sales/sq.ft):	Food =	$372.96 .	DSTM	$135.08
1986 Adjusted Levels ($sales/sq.ft):	Food =	$358.54 .	DSTM	$156.38

Source: Table 4, Table 6A and Appendix C

TABLE 13: Comparison of Demand and Supply for DSTM and Food

		Demand	Supply*	Gap
			(sq.ft.)	
DSTM	($156.4 /sq.ft.)	3,792,966	3,915,111	122,145
Food	($358.5 /sq.ft.)	793,017	768,296	-24721

TABLE 14: Actual vs. Equilibrium Level of sales($)/sq.ft. of G.L.A.
October 1986

	Actual	Equilibrium
DSTM:	$151.5 / sq.ft.	$156.4 / sq.ft.
Food:	$370.1 / sq.ft.	$358.5 / sq.ft.

Source: Table 13

APPENDIX A

Estimated Retail Sales by Major Store Groups and Type of Commodity (Saskatchewan, 1974)

Commodity	Food Stores		DSTM Stores		Other Stores		Total	
Food & Beverages	477210	90.22%	26410	4.99%	25320	4.79%	528940	100.00%
Tobacco	23824	57.15%	15530	37.25%	2336	5.60%	41690	100.00%
Clothing		0.00%		100.00%		0.00%		100.00%
Footwear & Repair **		0.00%		99.00%		1.00%		100.00%
Furnishings & Supplies****		9.10%		90.40%		0.50%		100.00%
Drugs & Sundries	4565	11.90%	33301	86.77%	512	1.33%	38378	100.00%
Recreation & Sporting ***		0.10%		73.09%		26.81%		100.00%
Books & Newspapers	8455	35.45%	14771	61.94%	623	2.61%	23848	100.00%
Jewellry Watches		0.00%		100.00%		0.00%		100.00%
Toilet & Cosmetics	5387	26.82%	14609	72.73%	91	0.46%	20088	100.00%
Auto Parts *	0	0.00%	30076	19.57%	123590	80.43%	153665	100.00%

* This category has been excluded from the study, both in terms of supply and demand due to the ambiguity of the statistical data.

APPENDIX B: TRADE AREA WEIGHTED INCOME INDEX

Area	Income Per Return	Index	Population	Weighted Population	Weighted Index
Saskatchewan	17,134	100.0	- -	- -	100.0
Primary Trade Area (PTA)					
Sector One - Regina	20,309	118.5	176,231		118.5
Division 6 less Regina	15,790	92.2	11,894		92.2
Secondary Trade Area					
Sector One					
Division 6 less PTA	15,790	92.2	21,489	19,803.8	
Division 2	17,148	100.1	3,732	3,735.0	
			25,221	23,539	93.3
Sector Two					
Division 6 less PTA	15,790	92.2	3,006	2,770.3	
Division 1	17,509	102.2	8,809	9,002.1	
Division 2	17,148	100.1	19,974	19,990.1	
Division 3	16,184	94.5	4,048	3,823.7	
Division 5	14,616	85.3	12,333	10,520.4	
Division 7	16,644	97.1	39,516	38,385.6	
Division 10	13,039	76.1	8,441	6,423.5	
Division 11	18,645	108.8	8,037	8,746.0	
			104,164	99,661.7	95.7

Source: Taxation Statistics, Revenue Canada, 1986 Edition (1984 data)

APPENDIX C: REGINA WEIGHTED G.L.A. EQUILIBRIUM ($1,000 1982 values) *

SIC ** Code	Regional Centre			Community Centres			Neighbourhood Centres			Overall Centres		
	Regina Fl. Space	National $/sqft	$ Sale Expected	Regina Fl.Space	National $/sqft	$ Sale Expected	Regina Fl.Space	National $/sqft	$ Sale Expected	Regina Fl.Space	National $/sqft	$ Sale Expected
J603	20,922	271.2	5,675	85,059	183.9	15,641	57,492	151.4	8,701	163,473	183.6	30,017
J611	22,371	200.5	4,486	26,216	131.1	3,437	2,283	89.2	204	50,870	159.8	8,127
J614	178,848	185.6	33,196	177,462	126.6	22,474	29,402	101.4	2,981	385,712	152.1	58,651
J615	2,943	156.9	462	23,254	88.4	2,056	20,969	83.3	1,747	47,167	90.4	4,265
J621	2,582	156.1	403	349,932	112.6	39,406	104,557	106.2	11,099	457,071	111.4	50,908
J622	5,328	335.4	1,787	67,953	248.7	16,899	113,338	208.5	23,625	186,619	226.7	42,312
J623	829	182.5	151	17,832	74.0	1,319	72,460	69.7	5,053	91,121	71.6	6,524
J641	275,881	116.5	32,151	941,793	102.6	96,656	170,548	49.9	8,510	1,388,222	98.9	137,318
J651	12,872	150.3	1,935	58,302	104.3	6,078	56,777	88.3	5,015	127,951	101.8	13,027
J652	6,152	254.7	1,567	18,736	89.1	1,669	106,613	133.3	14,206	131,501	132.6	17,442
J653	8,369	147.9	1,237	77,721	86.3	6,705	57,003	81.3	4,636	143,093	87.9	12,578
J654	19,436	233.1	4,531	49,908	125.2	6,247	18,648	118.0	2,200	87,991	147.5	12,978
J655	13,460	237.2	3,193	52,134	200.0	10,425	5,769	188.5	1,087	71,363	206.1	14,706
J656	19,490	288.5	5,623	18,604	161.8	3,010	8,018	142.7	1,144	46,112	212.0	9,777
J657	7,297	446.9	3,261	6,246	348.1	2,174	19,276	328.1	6,324	32,818	358.3	11,759
J658	10,086	164.5	1,659	22,371	93.0	2,080	38,664	85.8	3,316	71,121	99.2	7,056
J659	315,439	243.3	76,734	62,218	146.6	9,119	81,643	111.5	9,103	459,300	206.7	94,956
DSTM	922,304	193.1	178,052	2,055,742	119.4	245,395	963,460	113.1	108,953	3,941,506	135.1	532,400
Oct. 86 Adjusted:												
DSTM		223.5			138.2			130.9			156.4	

* Refer to Figure 3 for the location the shopping centres.
** See Table 1 for description of the related SIC (Standard Industrial Classification) list.

Source: Dollars & Cents of Shopping Centres, Urban Land Institute, Washington D.C., 1984 (1982 data)

APPENDIX D: REGINA BUSINESS FILE

The Regina Business file lists all taxable businesses in Regina. This is the Planning Department version of the original Assessors tax role and includes additional information. The supplementary information is essential for the supply and demand model implemented in the annual monitoring retail floor space through the Retail Market Study.

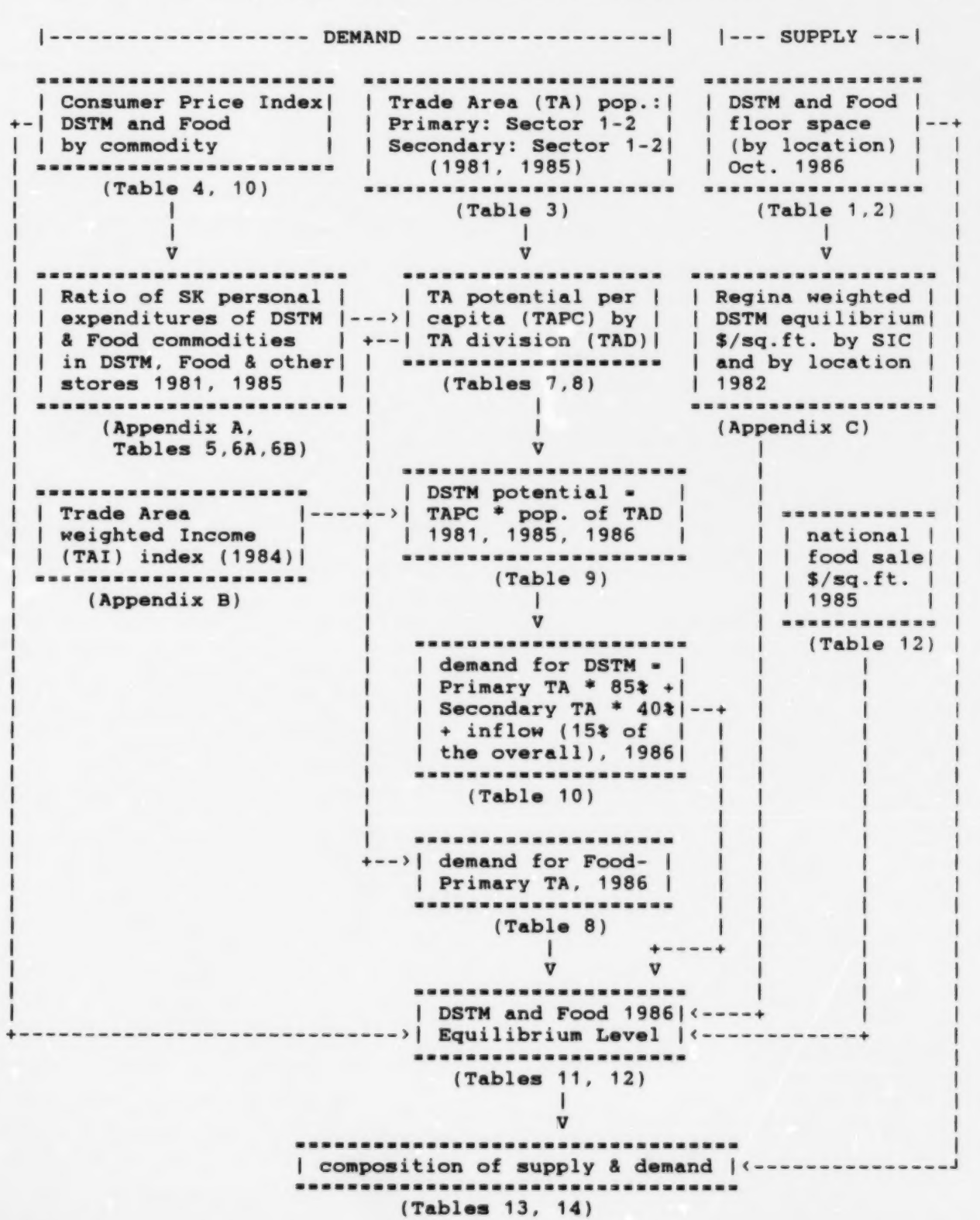
Each record of the 4151 business (as for October 1986), includes the following variables:

- business name
- business address
- postal code (when available)
- assessors area code
- assessment (confidential)
- taxable floor space (confidential)
- assessors business code
- Standard Industrial Classification (SIC) code
- mall code (downtown, 7 major mall, small shopping centres, retail strips)
- level of location (regional, community, neighborhood)
- date of establishment after base year (1986)

The list can be sorted and sub-sorted by each variable. It is intended that the listing will be extended in scope and details (to include tax exempted businesses, and to identify the number of employees of all businesses).

APPENDIX E

SUPPLY & DEMAND OF FLOOR SPACE FOR DSTM AND FOOD:
Calculation flow-chart of the 1986 report


DEMAND
SUPPLY
Consumer Price Index DSTM and Food by commodity
(Table 4, 10)
Trade Area (TA) pop.: Primary: Sector 1-2 Secondary: Sector 1-2 (1981, 1985)
(Table 3)
DSTM and Food floor space (by location) Oct. 1986
(Table 1,2)
Ratio of SK personal expenditures of DSTM & Food commodities in DSTM, Food & other stores 1981, 1985
(Appendix A, Tables 5,6A,6B)
TA potential per capita (TAPC) by TA division (TAD)
(Tables 7,8)
Regina weighted DSTM equilibrium $/sq.ft. by SIC and by location 1982
(Appendix C)
Trade Area weighted Income (TAI) index (1984)
(Appendix B)
DSTM potential = TAPC * pop. of TAD 1981, 1985, 1986
(Table 9)
national food sale $/sq.ft. 1985
(Table 12)
demand for DSTM = Primary TA * 85% + Secondary TA * 40% + inflow (15% of the overall), 1986
(Table 10)
demand for Food- Primary TA, 1986
(Table 8)
DSTM and Food 1986 Equilibrium Level
(Tables 11, 12)
composition of supply & demand
(Tables 13, 14)